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ABSTRACT

The 2.5-day workshop described in this manual was designed to meet the growing concern that small projects administered by the Peace Corps were not truly community projects or priorities. To foster more community involvement in the design, implementation, and evaluation of projects, this workshop is geared to the training of Peace Corps volunteers and community members in project development. The workshop is organized in eight sessions that cover the following topics: workshop expectations/group resource identification; characteristics of successful projects; problem analysis as part of project identification; setting project objectives; identifying project resource needs; testing project feasibility; determining project roles and responsibilities; and monitoring and evaluating small community projects. Each session includes a targeted time frame, a rationale, objectives, instructions for trainer preparation, a list of materials needed, participant handouts, procedures for conducting the training session, trainer notes, and closing procedures. Sample forms and worksheets are provided. (KC)

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SMALL PROJECTS DESIGN AND MANAGEMENT

TRAINING MANUAL FOR VOLUNTEERS AND COUNTERPARTS

Prepared for Peace Corps by

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INFORMATION COLLECTION AND EXCHANGE
TRAINING MANUAL

January 1987

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INTRODUCTION TO THE MANUAL

The two-and-a-half day workshop was designed to meet the growing concern that SPA projects were not truly community projects or priorities. To foster more community involvement in the design, implementation, and evaluation of projects, this workshop is geared to the training of PCVs and community members in project development.

While the workshop design was sponsored by the SPA program, it is relevant for any type of community project, whether or not outside funding is utilized.

The goals of the workshop are:

1. To increase participants' understanding of the importance of having community involvement and ownership of small projects.

2. To have participants become familiar with, and use, new management tools, i.e., problem-solving, planning, proposal writing.

3. To determine the appropriate use of external assistance in community projects.

PCV participants in the workshop should have had at least 3-4 months of experience at their sites and have completed some basic community development training during their PST. If they do not have any background or familiarity with community development, the workshop will have to be expanded to include sessions on community development principles, needs assessment, and information-gathering. Country-specific sessions on proposal writing and available resources may also be included if they have not been addressed in other training sessions.

Host-country participants, whether they are official counterparts or not, should be individuals with whom the PCVs will work on community projects. A wide discrepancy in participants' language and literacy skills will cause difficulties and should be minimized whenever possible.

All participants should be informed of the workshop goals beforehand, and should think about community problems that could be addressed through a small project. The workshop is a practical working session based on the ideas participants bring to it. Participants must be willing to work on developing their project ideas and testing their assumptions during the sessions.

The sessions were designed for use by the "typical" Peace Corps trainer--someone with strong technical experience and a minimum of process training experience. Each session builds on the previous one, and can be expanded to include country-specific materials/issues.

This manual has been utilized in draft form for approximately one year. As a result of these workshops, the design has been refined and adjusted to its present form. Special thanks go to Linda Spink, Peace Corps/Small Projects Coordinator, for her feedback and design suggestions as a result of the four IST/SPA workshops she conducted throughout the Peace Corps world. Her input was invaluable in producing the final version of the workshop design.

SESSION I: WORKSHOP EXPECTATIONS/GROUP RESOURCE IDENTIFICATION

TIME: 1 HOUR

RATIONALE:

This session will have two purposes: 1) to give the participants an opportunity to examine their expectations of the workshop, and 2) to identify individual expertise in the development and management of small community projects.

(Please note that this session can be substituted by any appropriate opening activity based on participant familiarity with each other.)

OBJECTIVES:

1. To identify and share participants' expectations about the workshop.
2. To identify the skills, knowledge, and experience of the participants in small community project development and management.
3. To discuss ways in which the group's skills and knowledge can be utilized during the workshop.

TRAINER PREPARATION:

1. Prepare newsprint for the following items:
   - Workshop schedule
   - Interview tasks

MATERIALS:

1. Newsprint and markers
2. Paper and pens for participants

PARTICIPANT HANDOUTS:

1. Workshop schedule, including all objectives

PROCEDURES:

Introduction:

(5 Min)

1a. Introduce the session by welcoming everyone to the workshop. Tell the participants that this session will focus on getting to know each other better and on clarifying what they would like to work on during the next few days.

1b. Briefly review the rationale for the session.

Expectations:

2a. Explain to the participants that unmet expectations are often a great frustration in training. To help avoid having that situation develop during this course, tell the participants that they will now be spending some time identifying what they would like to learn at the course and comparing that with the actual schedule.

(10 Min)

2b. Ask the participants to individually write down their answers to the following question: WHAT I WOULD LIKE TO LEARN AT THIS WORKSHOP. Have the items listed ordered in terms of importance.

2c. Solicit each participant's top two expectations for the workshop and put it on newsprint, obtaining any needed clarifications as you proceed. (For similar expectations, put checks next to the statement to indicate agreement.)

(10 Min)

2d. Distribute copies of the workshop schedule (already on newsprint) and match it with the participants' expectations, identifying those items which will be addressed and those which (due to limited time) will not be formally handled.

TRAINER NOTE

Share your own expectations of the workshop with the group, and add them to the composite list on newsprint.

Suggest that expectations not being formally addressed during the workshop may be dealt with informally by the participants during free time.

Identifying Resources:

3a. Point out to the participants that the workshop is meant to be a sharing of skills they already have in addition to learning new areas of expertise. Now that they have a clearer understanding of the objectives of the workshop, and know which of their own expectations can be met in the sessions, the next step will be to discover more about the project design and management skills and experience they have brought with them to the workshop.

3b. Have the participants form pairs with someone they don't know well. Instruct them to spend the next 10 minutes interviewing each other, and focusing specifically on their knowledge, skills, and experience in project design/management, as well as any other resources which could be helpful during the workshop. Have them put their information on newsprint. (10 Min)

3c. Reconvene the participants and have the pairs introduce each other to the large group, and post the newsprint on the wall for everyone to review at their leisure. (Optional)

3d. Lead a short discussion of the participants' overall impression of the resources that exist in the group, and how they might utilize them throughout the workshop. (15 Min)

CLOSURE:

4. Close the session by reinforcing the fact that the skills and knowledge of the participants will be called upon during the up-coming sessions, and encouraging participants to seek out individuals with particular backgrounds they feel are applicable to their project plans. (5 Min)

SESSION 2: CHARACTERISTICS OF SUCCESSFUL PROJECTS

TIME: 1 HOUR

RATIONALE:

Throughout its 25-year history, the Peace Corps has learned important lessons about the key ingredients in successful projects. No longer are projects which simply "deliver services" to communities considered to be sufficient. Much more thought is being given to the need to develop the community's capacity to solve its own problems in the future. This implies a need to involve the community members in projects from the design through the evaluation stages, and necessitates that Volunteers play more of a "consultative" rather than a "directive" role.

During this session, the Volunteers will draw on their experiences in their primary assignments, and in community projects, to identify what the common characteristics of successful projects are.

OBJECTIVES:

1. To identify the essential characteristics of successful projects, and to examine the role of the project designers and implementors in their success.

2. To discuss the potential obstacles to project success, and begin to focus on ways of avoiding them.

3. To introduce the main purpose of the workshop: effective project design, implementation, and evaluation as applied to the Volunteer's role in the small community projects.

TRAINER PREPARATION:

1. Read the attached articles, "The Alchemy of Success" and "Lessons from the IAF Experience". Prepare a sufficient number of copies to be given to the participants.

2. Prepare newsprint for the following:
   - Small-group discussion questions

MATERIALS:

1. Newsprint and markers
2. Writing paper and pens for participants

PARTICIPANT HANDOUTS:

1. Alchemy of Success (at the end of the session)
2. Lessons from the IAF Experience (before the session)

PROCEDURES:

(5 Min) **Introduction:**

1. Explain to the participants that this session will help to set the stage for the rest of the workshop in that it will focus on the common characteristics that successful projects seem to share, regardless of their size or their technical emphasis. Go over the rationale for the session as written above.

(5 Min) **Identification of Characteristics of Successful Projects:**

2a. Explain to the participants that the first part of the session will give them an opportunity to draw on their own experiences with projects to identify what makes them succeed or fail, and what can be done to increase the likelihood of developing successful projects. Remind them that Peace Corps views the success of projects in terms of two important goals: the production of the service or products, and the building of local capacity to do similar projects in the future.

TRAINER NOTE

Reinforce the definition of production and capacity-building goals as follows:

Production goals: are generally statistically verifiable; for example, yields of crops per hectare; numbers of families provided with improved primary health care, etc.

Capacity goals: are verifiable by observation, interviews, and/or by quantitative methods (such as number of persons trained in and performing installation and maintenance of a water supply system; community leaders preparing their own funding proposals for village improvements, etc.

2b. Divide the participants into small groups of 5-6 members and assign the following questions: (20 Min)

Group I. In your experience, what makes projects successful? For the successful projects you know, are there any specific characteristics you believe contributed to their success?

Group II. In your experience, what kinds of obstacles are there to successful projects... administrative, technical, organizational, cultural/social, etc.?

Group III. What can project planners and implementors do to help their projects be more successful?

Instruct each group to put their list on newsprint, and to select a member who will present their results to the large group. (Should it be necessary to have more than three groups, assign two groups to the first task, then two to the second, etc.)

2c. Reconvene the participants, and have each small group present its list to the large group. Allow sufficient time for questions and discussion of the lists. (15 Min)

TRAINER NOTE

Ensure that the lists include the following items, in addition to the points made in the IAF article:

- Involvement of the community in all phases of the project planning and implementation.
- Clear roles and responsibilities for all those involved with the implementation of the project.
- Well thought-out plans, budgets, and time schedules that allow the project to be completed within the funds and time allotted.
- An effective monitoring system which measures the project's progress, identifies problems, and provides a mechanism for necessary changes in the project.
- A mechanism for training community members in effective maintenance of the project.
- Community ownership and involvement

(10 Min)

2d. Ask the participants if they feel that the characteristics they have identified are also necessary for their work as PCVs. Have them think about their current job assignments ...are they aware of the plans? The objectives? Where they fit in?

2e. Briefly review the points in the IAF article, validating the similarities between the groups' lists and the points in the article.

(5 Min)

CLOSURE:

3a. Close the session by pointing out that the characteristics they have identified are essential to all projects, large and small, funded or non-funded. Point out that the main purpose of the workshop will be to help them identify ways of making sure that these characteristics are included in the small community projects with which they are involved.

3b. Point out that understanding what makes projects successful can significantly affect how you go about working on them. Link to the next session on problem identification as the first step in the development of new projects.

3c. Hand out the article, "The Alchemy of Success", for the participants to keep as reference material.

THE ALCHEMY OF SUCCESS (PART I)

ENTRENA, S.A.

GRINGO GRITA 1982

The following article appeared in the December, 1981 issue of "The New Internationalist", a magazine devoted to Third World and development issues. The article struck me because of its applicability to Peace Corps Volunteers in this country where the history has reinforced the "give me" and "do for me" dependencies.

It is especially hard for PCVs to fight this paternalism because they have only two years in which to work. In order to feel useful and maintain motivation during that time most PCVs need to see some sort of progress. However, the type of progress that leads to development can rarely be perceived within two years. On the other hand, "give me" and "do for me" projects can offer great satisfaction and pride within a short period of time. The damage they cause cannot be observed until much later, when the RPCV is safely back in the States proud of his accomplishments in the D.R.

The article made me re-analyze my work as a PCV and offer some valuable insights for all PCVs.

Kathy Stearns

THE ALCHEMY OF SUCCESS

The principal cash crop along lower Cauca River was rice, so the program at El Naranjo,[1] Colombia, bought the village a thresher and huller along with a motor to run them, and organized a cooperative to market the rice downriver. It also bought a tractor to help increase rice production and generator to light the village. The first year, dug-out canoes brought tons of rice to the El Naranjo cooperative, which hulled it and sold it at the highest price the farmers had ever received.

I visited El Naranjo about six years after the program closed down to see how the work had continued. In short, it hadn't. El Naranjo had become a virtual graveyard of rusting equipment and abandoned hopes. The motor had broken down and had never been repaired, so the huller could not be used either. The thresher had never been used because farmers preferred to thresh their rice in the field. The tractor had broken down and no one had cleaned up the generator since the year a flood had covered it with mud. The cooperative had disbanded completely; its building, by far the largest in El Naranjo, was full of cobwebs. Yet, as I made my way through the village, half a dozen different people pleaded with me, but if World Neighbors would just come help us again, we could do so much.

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[1] El Naranjo is a fictious name, but the program's story is a true account of the program World Neighbors supported in Latin America.

THE ALCHEMY OF SUCCESS (PART II)

The outcome at El Naranjo was shocking, but hardly surprising. The hulks of well-intentioned but long-forgotten give-aways are scattered all over the Third World. I have personally seen tractors by the dozens, not to mention ploughs, cultivators, generators, threshers, pumps, scythes, lantems and grain mills that were never repaired after the first time they broken down. There are donated granaries that were never used, free high-field seed that was eaten, give-away breeding animals that were sold or slaughtered for meat, and forest and fruit tree seedlings that died while still in their plastic bags.

More and more organizations are also becoming convinced that give-aways are not only ineffective, but, in fact, are detrimental. Why? The reasons are numerous. First of all, when the only progress villagers see is accompanied by give-aways, villagers can easily become convinced that they are incapable of making progress by themselves. Typical is the feeling of the people in El Naranjo that they cannot do anything without more outside "help". This feeling of inadequacy in turn creates dependency and subservience, robbing people of their self-respect. Furthermore, when people feel incapable of doing anything by themselves, self-help projects become more difficult than ever.

Another problem arises because charitable agencies normally do not give things away to everyone, rich and poor alike. They give only to the poorest. Bitter divisions have thus been created in community after community by the jealousy that erupted when one family received seeds, fertilizers or food and another did not (who is poor, and who is really poor?)

People often become accustomed to give-aways and even come to expect them. World Neighbors found it nearly impossible to work in northeast Honduras after the Hurricane Fifi relief effort because many villagers refused to work with anyone not dispensing charity. In Togo half the women in a group attending nutrition classes quit because they felt cheated; they had heard that a similar group ten kilometers away was receiving free milk during its classes.

Handouts can also blind people to the need of working at their own problems. In the terms of one well-worn metaphor, you can give people so many fish that they lose all interest in learning to fish. Handouts can also divert people's attention from the underlying demographic, institutional or political problems that, sooner or later, they must face if permanent progress is to be made.

Give-aways can be as detrimental to programs as to people. First of all, they are monstrously expensive. Supplying a family with half its wheat for 30 years can easily cost 50 times as much as does teaching a family to double its own wheat production. Secondly, give-aways can cover up people's indifference to program efforts. Villagers anticipating an occasional handout may faithfully attend classes for years without intending to adopt a single innovation. A non-paternalistic program will know at once if farmers lose interest in what is being taught because attendance drops immediately. Months of useless, expensive training can be avoided.

Justice demands not that outside agencies give things away, but rather that people be taught to help themselves, with their dignity and self-respect intact, and that these efforts cost as little as possible so that the maximum number of people can be reached with the funds available.

Two top-quality South American agronomists were asked to help the community of Yanimilla raise its milk production. By culling the herd, improving the irrigation system and planting new pastures, they showed the people how to raise production from 25 to over 100 liters a day. Six months after they had left Yanimilla, production had plummeted back to 30 liters a day.

Once again, although the results were disappointing, they were not surprising. For the paternalism at Yanimilla is a close cousin to that of El Naranjo. It is that of doing for people as opposed to giving to them. Although this second kind of paternalism is admittedly more subtle than the first, it can do just as much damage. And, because of its subtlety, it is even more widespread than the first and often less recognized as being harmful. First of all, doing things for people seldom achieves permanence. The rusting hulks of abandoned development efforts done for the people are as common as those of abandoned give-away machinery. Once there are no outsiders to make trips to town, do the accounting, make decisions, pay the bills, or keep people working together, the work halts as abruptly as when the handouts end.

Secondly, doing things for people creates a sense of dependency and inadequacy. The "Please, won't you give us something?" changes to the equally obsequious "Please won't you do something for us?" but the helplessness and dependency are the same. The people of El Naranjo were dependent on expatriates to run their cooperatives as they were for expatriates to buy them a tractor. As a result, neither the tractor nor the cooperative provided them any sense of accomplishment or self-worth.

If we are to avoid paternalism, either giving to people or doing for them, our only course of action is to motivate the people to do for themselves. But how? How can these people who so often seem to be conservative, traditionalist and non-innovative become motivated? Somehow the people must acquire enthusiasm.

Enthusiasm is known by a good many other names, too: determination, drive, commitment, motivation, inspiration, even love of one's work. It is the desire or willingness to work, to step into the unknown, to experiment, study, make decisions, cooperate with others toward a common end.

When enthusiasm is plentiful, farmers walk two full days to attend classes, innovations spread spontaneously from one farmer to another and many former problems seem to solve themselves. In extreme cases hundreds of farmers in Guatemala and El Salvador put in 30 to 35 days of backbreaking labor to conserve each 0.1 hectare of their soil.

Instilling enthusiasm is the only plausible way of avoiding paternalism. The question, then, is the same one Jawaharlal Nehru asked years ago: "How to bestow on the villagers that sense of partnership, that sense of purpose, that eagerness to do things?" Each of the following can be crucial in stimulating enthusiasm:

- The people must want the problem to be solved.
- The solution must be within their means.
- The people must have faith in the program personnel.
- The challenge must be simple enough at first so they can participate, yet become increasingly complex so they can grow in their ability to deal with problems and feel an increasing sense of accomplishment.

None of these conditions will, however, inspire much enthusiasm if early recognizable success is lacking. Villagers skeptical of the program's competence or benevolence will change their minds only when they recognize that the program has benefited them. Identifying with or participating in efforts that never succeed will produce not enthusiasm, but pessimism, shame and disappointment.

While enthusiasm is the driving force, increasing participation is the direction programs must take. Involvement of local villagers helps ensure that the program will respect local cultural values and local needs. Obviously no one can provide more understanding than villagers who work in the program. Salaries and transportation for small farmer employees are much less expensive than for professionals. Furthermore, the involvement in management by villagers helps them to appreciate the program's obstacles and dispels suspicions about its motives.

More important, small farmer participation may be essential to the permanence of a program's work. During five or six years of studying by candlelight, slogging through the mud and teaching classes late into the night, villager extensionists can become tremendously committed to the success and continuity of their work. This commitment, plus their know-how and teaching ability, will remain in the villages after the program leaves.

Definitions of development abound, but most people would now agree that development is a process whereby people learn to take charge of their own lives and solve their problems.

Two corollaries immediately follow. First of all, giving to and doing things for people have nothing to do with development. On the contrary, they are the very opposite. Secondly, the developmental process, whereby people learn, grow, become organized and serve each other, is much more important than the greener rice field and fatter coin purses that result. The how it is done matters more than the what is accomplished.

LESSONS FROM THE IAF EXPERIENCE
Peter Hakim

The Inter-American Foundation was conceived by Congress as an experimental agency that would test and promote new ideas about development. Because of its experimental nature, the Foundation has given continuing attention to learning about grassroots development. The following "lessons" are generalizations about self-help projects that have emerged from nearly 10 years of practical experience watching projects succeed and fail.

- Poor people know what they require to satisfy their interests, meet their needs, and solve their problems. This does not mean that they know all the obstacles that are likely to emerge, have full information about alternative approaches, or will avoid serious mistakes and pitfalls. It does mean that projects work best when the intended beneficiaries are listened to and their ideas respected, and, indeed, when the projects are initiated, designed, and managed by the beneficiaries themselves. Mistakes will be made and failures will occur, but if the people directly affected are in charge and have access to needed technical assistance and training, they are likely to learn and emerge stronger for the next challenge.

- Grassroots organizations greatly enhance the opportunities of poor people to improve their own lives. By organizing, working together, and sharing scarce resources, poor people can find new employment opportunities, raise their incomes, and bring vital services to their communities. They also gain bargaining power that makes them better able to secure more equitable arrangements with merchants, landlords, and government officials, and they can begin to transform their needs and hopes into demands and results. There are large and growing grassroots groups through which poor people are striving to improve their situations. Even though many of these organizations are fragile and operate under adverse conditions, they have shown time and time again that they can effectively use development assistance and contribute to the economic and social development of their members. Their endurance in the face of great odds underscores the importance of these organizations to their communities. Peasant cooperatives in Haiti, Paraguay, and Peru supported by the Foundation are giving subsistence farmers access to credit and technical assistance for the first time. Community groups in Bolivia and Mexico are bringing health and nutrition services to their population. Workers in Jamaica, Chile, and Uruguay have created jobs by organizing their own enterprise.

- Organizations that are best able to serve the needs of poor people and poor communities share four characteristics; first, they provide tangible economic benefits to their members. Poor people will not invest their scarce time and resources in organizations that do not provide them economic gains. Second, their membership has an active voice in running the organization. Members do not necessarily share power equally or take part in every decision, but there are accepted procedures for securing the members' views, for resolving controversial issues, and for changing leadership.

A third characteristic is that benefits are distributed equitably. Although everyone may not get an equal share, the procedures for determining allocations are fair, and the resulting distribution is not skewed toward any particular group. Finally, the organizations have or can acquire the managerial and technical expertise to affect change.

- Strong, committed leadership is important to the development of local organizations and to their ability to perform effectively. But dependence on one imposing leader, particularly from outside the community, is a sign of organizational weakness. A high failure rate is associated with projects built around one strong central figure and lacking wider participation in decisions. The Foundation has learned this lesson the hard way; in almost every country in which it works, it can point to projects that have come to a halt and organizations that have been disbanded because their inspiration and leadership rested in a single person. Organizations, moreover, are often seriously debilitated by their inability to change their leadership and management style in response to evolving needs. In the early stages of their development, organizations may demand inspirational leadership to mobilize people and resources. As organizations grow and mature and as the services they provide become increasingly complex, they require managers with technical, professional, and administrative skills.

- Successful projects are often those that have taken unusual turns and have reached unexpected, inadvertent outcomes. Efforts to restrict projects to their original purposes can stifle creativity, prevent the emergence of new solutions, and deny opportunities for taking advantage of changing circumstances and new ideas. The most productive projects are not necessarily those that have achieved their initial goals; rather they tend to be projects in which (1) the local organization and its members have acquired skills, knowledge, and capacity to solve problems and manage programs; and (2) local resources and initiatives have been mobilized for sustained efforts over time. A group of 13 Jamaican women were dissatisfied with their jobs as street-cleaners in a make-work government program. When they were unable to carry out their plans to start a restaurant, the women requested that a Foundation grant be redirected to permit them to organize a workshop for silk-screen production. The workshop is now operating, and indications are that it will produce sufficient income for the women to leave the welfare program.

- When assisting poor people and fragile organizations that are operating in difficult circumstances, it is important that red tape, bureaucratic delays, and demands for information be kept to a minimum. A short response time to proposals, straight-forward criteria for assessing projects, and limited paperwork are desirable when working with small, local organizations. These measures avoid frustration, suspicion, and exasperation--and let the organization and its leadership get on with the job rather than trying to satisfy outside demands. A quick "no" may be preferred to a drawn-out "yes."

- In working with local organizations, project objectives ought to be specific. Who the beneficiaries are and how they are to be benefited should be clearly defined. Broad or vague purposes, no matter how inspiring, are not conducive to effective action. Local organizations are best at handling discrete tasks that have a clear beginning and end. The problems of poverty do not have to be confronted comprehensively for progress to be made; indeed, successful groups usually start with one activity and only later move to another.

- Organizations need time to grow and mature. Even groups that have survived and prospered over long periods may have difficulties adjusting to new tasks or challenges such as managing larger amounts of funds than they have been accustomed to. The development efforts of promising organizations can be frustrated by unrealistic expectations that they can become self-sustaining or produce large gains within a short period. A slower pace of development with assistance forthcoming over a longer period may be more conducive to ultimate success. A Peruvian fishing cooperative, the Foundation's very first grantee, lost more than half its members and was nearly forced out of business when the anchovy disappeared from the coast of Peru. Now, after 10 years of struggle, the cooperative has rebuilt its membership and is a profitable enterprise.

- The success of self-help organizations and projects is sometimes dependent on the ability of organizations to secure services or resources that only governments can provide. At a minimum, some form of legal status may be required to conduct certain activities. Frequently, more is necessary. For example, organizations that disburse credit--if they are to offer reasonable interest charges while maintaining the value of their capital--often require access to subsidized credit from public agencies. Self-help housing projects need local governments to provide sewerage, water, and electricity. Educational programs may require some form of official accreditation. Early and sustained attention directed toward gaining required governmental assistance can be a crucial element in the success of projects.

SESSION 3: PROBLEM ANALYSIS AS PART OF PROJECT IDENTIFICATION

TIME: 2 HOURS, 45 MINUTES

RATIONALE:

In the previous session, we focused on the characteristics of successful projects. One of the essential ingredients identified was a clear understanding of the community problem being addressed. Unfortunately, this clarity is not always obtained before initiating projects, often resulting in projects that are not really local priorities, misunderstandings of what really was supposed to be accomplished, etc. Sufficient time must be devoted to gathering and analyzing relevant information, and developing a clear statement of the problem to be addressed.

This session focuses on a model which may be used in the definition of a problem, the analysis of its key factors, and the implementation of effective solutions. It is a model which Volunteers can use in working with their communities on the development of small projects.

OBJECTIVES:

1. To identify and analyze the key elements in a development problem situation, including causes and effects.
2. To practice the seven-step model of problem-solving, as it applies to project identification.
3. To convert the identified development problem into objectives that describe the desired change.

TRAINER PREPARATION:

1. Read the article, "Seven-Step Problem Solving Approach", for background before the session.
2. Check with the participants to see if they have done the RVDW Problem-Solving session during pre-service training. If so, use this session to review the problem-solving steps and proceed to the project application.
3. Check to see if the participants have already developed small projects in their communities.
4. Prepare newsprint for the following items:
   - Seven-Step Problem Solving Approach
   - Instructions for the Fishbowl Exercise
   - The steps of problem analysis for project identification.

MATERIALS:

1. Newsprint and markers
2. Writing paper and pens for participants

PARTICIPANT HANDOUTS:

1. Seven-Step Problem-Solving Approach
2. Charting a Problem-Solving Discussion
3. Problem Worksheet

PROCEDURES:

(5 Min)

Introduction:

1a. Review the rationale for the session, as written above. Point out to the group that the seven-step problem-solving method they will be using during the session can be used when working with communities in the development of projects, and can also be helpful in solving cross-cultural or personal issues that come up during their Volunteer service.

1b. Reinforce the fact that we all solve problems in our daily lives, and the method which will be introduced in this session is one way of completing the problem-solving process systematically.

Seven Steps of Problem-Solving:

(15 Min)

2a. Distribute the handout, "Seven-Step Problem-Solving Approach", and review it with the participants to ensure that everyone understands it clearly.

2b. Divide the large group into two small groups for a fishbowl exercise (Group A and Group B), and assign each group one problem to work on from the list generated by the trainers before the session. (Be sure that the problem selected actually exists in their current job situations to ensure that the discussion is relevant.)

2c. Set up the fishbowl exercise with Group A in the center of the room and Group B surrounding them. Ensure that the observers are close enough to hear the interactions of the inner group, but not so close that they interfere.

2d. Provide the following instructions for the task:

   a. Group A will discuss the problem chosen, following the steps of the problem-solving sequence.

   b. Group B will observe the discussion and chart the sequence using the "Form for Charting a Problem-Solving Discussion".

   c. At the end of Group A's discussion, roles will be reversed. Group B will discuss its selected problem, and Group A will chart the sequence.

2e. Distribute the charting forms to Group B, and briefly explain them. Instruct Group A to then begin its discussion. (10 Min)

2f. At the end of the appointed time, have the groups reverse roles. Distribute the charting forms to Group A, and briefly explain them. Instruct Group B to then begin its discussion. (10 Min)

At the completion of both group discussions, ask each group the following questions: (10 Min)

- What pattern did the other group tend to follow when discussing its problem?
- Was the group able to achieve a consensus? If not, why not?
- What were some of the difficulties in following the problem-solving sequence?
- Did you notice any patterns of communication within the group? Did some members take on leadership roles? Did everyone participate in the process? How?

2g. Lead the large group in a discussion of the following points: (10 Min)

- How the use of this process can be of assistance in solving problems related to small-community projects.
- What issues can occur when problems are not carefully analyzed during the project planning phase.

TRAINER NOTE

Include the following areas, if the participants do not identify them on their own:

- Jumping immediately from problem identification to solution.
- Confusing problems with causes.
- Finding the right solution to the wrong problem.
- Not clarifying the problem.
- Not identifying criteria to evaluate the effectiveness of the solution.

CLOSURE:

3. Close the first portion of the session by explaining to the participants that the problem-solving approach they have just practiced can be used in the development of community projects, and that the second half of the session will focus on the application of the process to specific problems. (5 Min)

BREAK: (15 Min)

PROBLEM ANALYSIS IN PROJECT IDENTIFICATION

4a. Remind the participants that, during the first half of the session, a number of difficulties were identified when the logical steps of problem-solving were not followed. Point out that following these steps is particularly important when considering a potential project because identification of the problem to be solved sets the stage for the type of intervention that is really needed. Tell the group that this part of the session will focus on applying the problem-solving steps to community problems and potential project interventions.

(60 Min)

4.b Pass out the "Problem Worksheet" and divide the participants into trios. Assign the following task:

a. Working individually, select a community situation at your site for which you would anticipate the need for a project intervention. (Allow a few minutes for the participants to make their selections.)

(20 Min)

b. Write a problem statement for your community situation, being as clear and concise as possible, while giving enough information for someone else to be able to understand the problem.

c. Exchange problem statements, and examine the possible causes of the problem. Outline what information you would want to have in order to analyze the problem.

(15-20 Min)

d. Exchange sheets again, and develop a list of alternative solutions for the problem statement and analysis you have received.

(15-20 Min)

e. Retrieve your original problem statement, and review it individually.

f. Review each problem statement, analysis, and alternative solution within the trio. Obtain any needed clarifications and discuss the following points: difficulties understanding the problem statement, whether the possible causes have merit, and which of the alternatives may be feasible. (This should lead to the selection of the best solution.)

(15 Min)

4c. Reconvene the large group and facilitate a discussion on the following questions:

- What was learned from reading each other's problem statements?
- Was it easier to analyze a problem and generate new solutions when you weren't involved?
- How might this exercise relate to real life situations when PCVs and communities are defining problems and trying to map out solutions?
- How would you proceed with an action plan, monitoring, and evaluation?

CLOSURE:

Close the session by indicating that the problem statements and solutions generated during this session will form the basis for the next step in project development--setting objectives.

(5 Min)

SEVEN-STEP PROBLEM SOLVING APPROACH*

STEP 1: Identify, State and Clarify the Problem:
Involves becoming aware of the problem, clarifying what seems to be involved, locating where the difficulty is, deciding on the main issues of the problem.

For example, the apparent problem is that no one in the community X is attending the classes given by a Peace Corps Volunteer. After clarification, it might be discovered that the real problem is the Peace Corps Volunteer's failure to build a credible image in the community.

STEP 2: Analyze the Problem by Gathering Facts and Information:
Involves gathering data needed to work on the problem in order to get to know all the possible causes.

For example, gathering information about why the people are not attending the classes will help clarify the ins and outs of the problem.

STEP 3: Develop Alternative Solutions:
Involves listing and examining all the various possible ways of solving the problem.

For example, the Volunteer could brainstorm a number of possible courses to take. He/she could try a small vegetable garden in part of his/her house, try to get to know people better on an informal basis, conduct a needs assessment, etc.

STEP 4: Select the Best Solution:
Involves choosing from among all the alternative solutions to determine the best one. The ideal alternative may not be the best alternative at the moment. The best alternative is best based on factors such as budget, time, politics, etc.

For example, the Volunteer might first attend community activities, next visit families, and then begin to work actively to develop community awareness.

STEP 5: Design a Plan of Action:
Involves outlining specific objectives and tasks to reach the goal.

STEP 6: Implement the Solution:
Put the solution into action and monitor its progress.

STEP 7: Evaluate:
Involves determining the effects or ramifications of the solution.

For example, at some point, the Volunteer determines if he/she has more credibility and people are attending classes, or if his/her actions have caused any other results not expected or desired.

* Adapted from Peace Corps/RVDW Manual

FORM FOR CHARTING A PROBLEM-SOLVING DISCUSSION

This is an exercise that will last for 15 minutes, each minute corresponding to one of the horizontal lines. During the discussion, make an X in the boxes corresponding to the time and content of the group's discussion.

IDENTIFY, STATE, AND CLARIFY THE PROBLEM	ANALYZE THE PROBLEM BY GATHERING INFORMATION	DEVELOP ALTERNATIVE SOLUTIONS	SELECT THE SOLUTION AND DESIGN A PLAN OF ACTION	IMPLEMENT THE SOLUTION	EVALUATE
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					

PROBLEM WORKSHEET

A. Write a problem statement for a community situation.

B. Examine possible causes of the above problem. Outline what information you would want to have in order to analyze the problem.

C. Develop a list of alternative solutions for the above problem.

SESSION 4: SETTING PROJECT OBJECTIVES

TIME: 2 HOURS

RATIONALE:

Once the community and the Volunteers have identified a problem, analyzed the causes and effects of the problem, and determined the type of project assistance needed, the next step is to write objectives for that project. These objectives state, in measurable terms, what the project will accomplish.

In this session, the participants will focus on the development of objectives for small community projects. They will discuss the types of information they require in project objectives, analyze and improve written objectives to make them measurable, and complete the project design chart for their own project ideas.

OBJECTIVES:

1. To identify the essential characteristics of good project objectives.

2. To critique small community project objectives, based on their clarity, feasibility, relevance, and measurability.

TRAINER PREPARATION:

1. Read the article, "Writing Objectives", for background information.

2. Prepare sample project objectives for the participants to critique, based on actual projects which exist in-country. (In-country PC staff may be helpful in this exercise.)

3. Prepare newsprint for the following items:
   - Objectives for national, community, and activity level objectives.
   - Instructions for the development of objectives exercise.
   - Project design chart. (It is recommended that the entire chart be placed on newsprint and filled out by the trainer as an example through each of the sessions. See sample at the end of the session.)

4. Photocopy the handout, "Writing Objectives", for each participant.

MATERIALS:

1. Newsprint and markers
2. Writing paper and pens for participants

PARTICIPANT HANDOUTS:

1. Writing Objectives

2. The Project Design Summary and worksheets (two copies per participant--one to use during the session, and one to take home with them for future use)

PROCEDURES:

(5 Min)

Introduction:

1. Introduce the session by explaining that even though people may agree that an important problem exists, they are no closer to solving it until they agree on what type of action needs to be taken, and how they are going to measure whether or not it was successful. One of the most common difficulties projects face is the lack of clear objectives to define what they are supposed to accomplish.

   In this session, the focus will be on writing and critiquing project objectives for small-community projects. This is part of the overall project design process, which also involves identification of resources required, testing of project assumptions, and development of monitoring indicators (project design chart on newsprint). These areas will be covered in detail in later sessions.

(20 Min)

STANDARDS FOR PROJECT OBJECTIVES:

2a. Write an "incomplete" project objective on newsprint, based on the problem statements developed during the previous session. Ask the participants what additional information would be needed to make the objective complete. (Use their responses to develop a list of "What Makes a Good Objective" on newsprint.)

(15 Min)

b. Use the results of the above discussion to develop a list titled "Elements of Good Project Objectives." Questions you can use to help prompt the development of the list are:

   - Why is it important to state project objectives in measurable terms?
   - What kind of information do you need to include in the project objective?
   - What happens if a project objective is clear and measurable, but impossible to achieve?

TRAINER NOTE

Ensure that the above list includes the following elements:

- Measurable (based on behavior)
- Relevant (related to the identified problem)
- Feasible (has a reasonable chance for success)

Identify the significant questions to be asked about project objectives as:

What needs to change?
How much change is needed?
For whom is the change targeted?
Where will the change occur?
When will the change occur?

2c. Have the group review three or four sample project level objectives according to both of the above criteria (based on information you have gathered regarding their primary assignments).

Levels of Objectives: (10 Min)

3a. Explain to the participants that large-country programs and small-community projects can have different levels of objectives. Certain objectives must happen before others in order to ensure overall success. Use the following example, which would apply to a Volunteer's primary assignment in-country (see attached examples):

a. Write a national level program objective on newsprint and have the participants assess whether it is a clear objective, based on the "Elements" developed earlier in the session.

b. Write a community level project objective that contributes to the national level program objective. Again, have the participants assess it.

c. Write an objective for one activity which contributes to the community level project objective. Have the participants assess it.

d. Have someone explain how the three levels of objectives relate to one another.

3b. Ask the participants to think about how their Volunteer assignments fit into this type of a "hierarchy" of objectives from the national to the local level. Ask for volunteers to give examples from their own jobs.

TRAINER NOTE

Ensure that the explanation in Part b. focuses on the fact that each level of objectives is necessary to reach the next level--both up and down the scale. Be sure the group understands that every objective, no matter at what level it is, must have the essential elements defined earlier.

3c. Explain that the rest of the session will focus on writing project objectives the participants can use in their work with communities. Although it is important to know that there are higher level program objectives, they will not be involved in writing them for community level needs.

(10 Min)

DEVELOPMENT OF PROJECT OBJECTIVES:

4a. Introduce the objectives on the sample project design chart and have the participants review them according to the elements of good project objectives provided earlier.

(20 Min)

4b. Ask the participants to refer to the problem statements they developed during the previous session. Have them each write one production objective, and one capacity-building objective for their proposed projects to address the identified problems. Stress that the objectives should include the elements of good objectives just discussed.

(15 Min)

4c. Have the participants exchange their written objectives for review and feedback. Stress that comments should be written down to allow the writer to refer to them later. After 10 minutes, have the reviewers explain their critiques to the writers, and allow time for final re-writes.

4d. Refer back to the sample project design chart, and introduce the tasks/timelines related to each project objective. Point out that this step of what needs to be done, and when it needs to be completed, is critical to the successful accomplishment of project objectives.

4e. Have the participants put their corrected objectives on the project design chart, and list all of the tasks that would be required to accomplish them. Tell them that the tasks should include a timeline for when the activities need to be accomplished.

TRAINER NOTE

Circulate around the room during this process to answer questions and make sure everyone is reviewing the objectives according to the essential elements identified earlier.

CLOSURE: (5 Min)

5a. Close the session by stressing that it is important to set objectives before starting a project. Otherwise, the variety of individuals (community, PCV, etc.) associated with the project may have different expectations of what the project is supposed to accomplish. Specifying the objectives, in writing, beforehand will help to ensure clarity, as well as potentially saving time and money during the actual implementation.

5b. Explain that the participants have been doing a lot of individual work and now will be given the opportunity to share their project ideas and receive comments from their peers.

5c. Pass out newsprint and have the participants put their problem statements, objectives, and tasks on the sheets. Tell them that they will be presenting this information to the group for comments and feedback. (15 Min)

TRAINER NOTE

Depending on the schedule and the size of the workshop, preparation for the presentations may be done during the session or as homework.

Divide the participants into small groups, if necessary, for their presentations. No more than an hour and a half should be needed for this exercise.

Instruct the small groups to pay particular attention to the clarity and logical flow of the problem statements, objectives, and tasks.

WRITING OBJECTIVES

Objectives should be expressed in terms of outcomes expected. Each objective should answer the question: **WHO** do you expect to do **HOW MUCH** of **WHAT** by **WHEN** and **WHERE?**

WHO:	target groups or individuals expected to change.
WHAT:	the action or change in behavior expected.
HOW MUCH:	the extent of change expected.
WHEN:	when desired conditions will be accomplished.
WHERE:	place in which the change will be observed.

The following steps will help you write complete objectives:

1. Write down **WHO** is the subject of the objective. For example: Farm families with plots ranging between 1-5 hectares in size.

2. Write down **WHAT** job or task will be done, or what change will be expected. For example: Farm families with 1-5 hectares of land have adopted new fertilizers.

3. Write down **HOW MUCH** quantity, quality, and/or time standards that apply to the objective. For example: Ten farm families with 1-5 hectares of land have adopted new fertilizers.

4. Add **WHEN** this will occur. For example: Within six months, ten farm families with 1-5 hectares of land have adopted new fertilizers.

5. Add **WHERE** this will occur. Within six months, ten farm families with 1-5 hectares of land will have adapted new fertilizers in Village X.

Adapted from: Michalak and Yagar, Making the Training Process Work. pp.67-72.

PROJECT DESIGN WORKSHEET

Problem Statement: Due to a lack of understanding of malaria, its causes, transmission and treatment, there is a high incidence of malaria in Diella during the rainy season.

OBJECTIVES AND TASKS	TIMELINE												RESOURCES (Outside and Local)
	J	F	M	A	M	J	J	A	S	O	N	D	
OBJECTIVE:													
After 8 weeks of training, 4 women, representing the 4 quarters of Diella will be able to give 3 causeries on malaria--causes, transmission and treatment for the people in their quarters.													
TASKS:													
1. Identify and analyze previous malaria control efforts	X												Documents and Statistics
2. Collect data on current practices	X												
3. Collect money	X												Donations, community chest
4. Identify resource people to assist with training	X												Chef du poste medicale, monitrice, PCV, agent d'hygiene
5. Identify women to participate	X												
6. Devise pre/post test	X												Expertise in developing pretest place
7. Organize information meeting and implement pretest	X												
8. Define and develop curriculum		X	-----	O									Expertise on malaria and curriculum development
9. Define roles for training women			X										
10. Define time and place			X										
11. Notify women and village			X										
12. Develop schedule			X										
13. Assemble or develop materials			X	--	O								Handouts, markers, pictures, felt board
14. Conduct training				X	--	O							Place, refreshments
15. Monitor				X	-	---	O						
16. Evaluate							X	--	O				Post-test

TRAINER NOTE
Session 4

PROJECT DESIGN WORKSHEET

Problem Statement:

OBJECTIVES AND TASKS	TIMELINE												RESOURCES (Outside and Local)
	J	F	M	A	M	J	J	A	S	O	N	D	
OBJECTIVE:													
TASKS:													

TRAINER NOTE
Session 4

PROJECT DESIGN WORKSHEET

Assumptions	Analyzing Assumptions			Monitoring Indicators	Evaluation Strategy
	Critical	False	Action Required	What, When, and How	
1. People don't like having malaria	yes	no		What: Attendance How: Take role When: Every class	1. Measure difference between pre/post tests looking for 20% increase.
2. Women will want to attend.	yes	uncl	Have conversations to determine interest.	What: Enthusiasm How: Attendance, observe level of participation	2. Observe that 3 out of 4 women give technically correct causeries.
3. Resource people are willing to conduct	yes	uncl	Have conversations to determine interest.	When: During class and in social situations	3. Observe that in 6 months women are still discussing and have started classes on other issues
4. Money is available	no			What: Material development How: Visit with presentors, rehearse sessions When: 1 month prior to session	4. Measure incidence of malaria in Diella 1 year later to see if there has been a statistically significant lowering of the incidence.
5. Women are available	yes	no			
6. Time and place can be agreed upon	yes	no		What: Resource people's availability How: Visit and send letter When: 1 month prior to session and 1 week prior	5. Observe in 3 months to see if women are applying information and taking preventive action, i.e. draining standing water, moving gardens from house.
7. Materials can be found	yes	no			
8. Research into is available	no				
9. Women can do causeries	yes	unc	Present material in language and in appropriate manner. Test it out.		
10. Resource people can present and be understood	yes	unc	Select resource people who speak local language. Work with them on presentation.		
11. Village women will listen to the women	yes	unc	Observe for leaders and carefully select.		

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TRAINER NOTE
Session 4

PROJECT DESIGN WORKSHEET

Assumptions	Analyzing Assumptions			Monitoring Indicators	Evaluation Strategy
	Critical	False	Action Required	What, When, and How	

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SESSION 5: IDENTIFYING PROJECT RESOURCE NEEDS

TIME: 2 HOURS

RATIONALE:

Every project, large and small, utilizes a variety of resources to reach its objectives. During the design phase of the project, it is important for the Volunteer and the community to identify the resources they will need, decide which ones are available locally and which ones need outside assistance, and make plans to ensure that all the needed resources will be available to the project at the appropriate time. Proceeding with a project before this activity is completed could lead to frustration and disappointment down the road if the needed resources do not materialize.

In this session, the participants will focus on identifying the possible types of resources which might be utilized in small community projects and developing guidelines for determining their appropriatenes.

OBJECTIVES:

1. To identify the types of resources necessary for small-community projects.
2. To develop a checklist for determining the appropriateness of different project resources, including those available within the community.
3. To discuss the importance of costing out resource needs for small projects.

TRAINER PREPARATION:

1. Read the attached article, "Thinking About Resources", before the session for background information.
2. Check with Peace Corps staff members, if possible, to learn the local requirements for community contributions to a small project.
3. Prepare newsprint for the following:
   - The "types of resources needed" list
4. Photocopy the handouts.

MATERIALS:

1. Newsprint and markers.
2. Paper and pens.

PARTICIPANT HANDOUTS:

1. "Thinking About Resources".

PROCEDURES:

(5 Min)

Introduction:

1. Introduce the session by explaining to the participants that the identification of necessary resources is a crucial element of project design. Point out that, broadly speaking, anything that is needed to reach the project objectives can be considered a resource. Explain the rationale for the session as written above.

IDENTIFICATION OF PROJECT RESOURCES:

(10 Min)

2a. Put the phrase, "Types of Project Resources Needed", on newsprint, and solicit examples from the participants of their experiences in their communities. Remind them that "resources" should be considered in the broadest sense, and should not be confined to only money or material.

TRAINER NOTE

Included in the types of resources are the following, with specific examples. Put the list on newsprint to be compared with the one developed by the participants for similarities and differences.

- **Human**: Community residents, Volunteers, technical advisors, consultants, trainers, extension workers, etc.
- **Material**: Tools, animals, equipment, textbooks, seeds, etc. (Specific examples will depend on the type of project.)
- **Financial**: Cash gifts, bank loans, foundation grants, Peace Corps small project funds, etc.
- **Technological**: Appropriate level of technical skills to implement.
- **Informational**: Books, research papers, records, etc., which give relevant background information for the project.
- **Individual**: Knowledge, skills, and attitudes of the development workers which influence the acceptability and implementation of the project within the community.

Photocopy the composite list for the participants to take home with them at the end of the course.

2b. Lead a large-group discussion of what they would see as the role of the community in the identification of necessary project resources. What sources of information/support should be explored before assuming the community does not have the resources needed? (15 Min)

APPROPRIATENESS OF RESOURCES:

3a. Explain to the participants that the introduction of outside resources into a community project has to be handled with care to ensure that they do not increase the dependency of the community on technologies which normally are not available or utilized.

3b. Brainstorm a checklist of what makes a resource "appropriate" to be used in a community project. (15 Min)

TRAINER NOTE

Included in the list of what makes a resource appropriate should be the following:

- A response to a locally recognized need
- Locally available
- Low cost
- Technologically appropriate
- Culturally acceptable
- Ecologically sound

Type the composite list for the participants to take home with them after the workshop.

3c. Explain to the participants that, while it is desirable to use locally available resources, sometimes it is necessary to bring in outside assistance. Lead a large-group discussion of what sources they would go to for assistance if necessary resources were not available at the community level. Explore with them when it is appropriate to seek resources or funding from donors, including Peace Corps, stressing that all local options should be exhausted first. Ask the participants what "dangers" they would see in too much reliance on donor funding. (15 Min)

3d. Brainstorm the following issues as a large group: (10 Min)

- The advantages of using outside assistance in projects. (Put the list on newsprint.)
- The disadvantages of using outside assistance in projects. (Put the list on newsprint.)

(15 Min)

3e. Divide the participants into two groups and assign the following task:

- Develop a list of strategies for minimizing the potential disadvantages of using outside assistance in projects.
- Put the list on newsprint for review by the large group.

3f. Reconvene the large group and allow a few minutes for the participants to read the small-group work. Ask for explanations of any items which are unclear and make appropriate summary comments on the work done. Reintroduce the capacity-building goal of Peace Corps projects by reminding the participants that all small community projects should increase the ability of the community to better solve its future problems.

TRAINER NOTE

Be sure the group includes the following points:

- A two-way dialogue during the problem identification and project design phase.
- Recruitment of project participants from the community, both as workers and as providers of materials and services.
- Training of community participants in the skills that are needed to carry out project activities and management, both during implementation and in the long term.

(5 Min)

3g. Return to the sample project being used in the session and complete the resources column as an example for the participants to follow in their own work.

(20 Min)

3h. Have the participants refer back to the project objectives they developed during the previous session and individually determine the specific resources they would need for their projects. Have them put the resources needed next to the specific objectives on their design chart.

(10 Min)

3i. Have the participants form pairs and review each other's resource lists in terms of the objectives developed earlier. Allow time for needed changes.

CLOSURE:

(5 Min)

4a. Close the session by pointing out that the identification of necessary resources is an important step in deciding whether a project is really worth pursuing. If it appears that the resources needed are too expensive, unavailable, or culturally inappropriate, the project must be seriously reconsidered in terms of its feasibility. Indicate that these issues will be addressed more fully during the next session.

4b. Pass out the handout, "Thinking About Resources", for the participants to keep as reference material.

THINKING ABOUT RESOURCES

INTRODUCTION

This section introduces the idea of resources, describes six basic types of resources, and presents guidelines to help development workers make intelligent decisions about getting and using these resources. It also discusses the ways that development workers might obtain, and help develop, community human resources.

DEFINITION

What is a resource? Broadly speaking, anything you use to reach a development project goal may be considered a resource. This open-ended definition should encourage you to think imaginatively about many different kinds of resources.

TYPES OF RESOURCES

Consider these types of resources:

1) human
2) material
3) financial
4) technological
5) informational
6) individual

1) Human resources are the people who contribute to, or participate in, your development project. While community residents will form the majority of the project's human resources, this category also includes such outside personnel as volunteers, technical advisors, consultants, trainers, librarians, extension workers, and any others who may work on the project in one way or another. In planning for human resources, consider more than the number of people which the project requires; consider also what attitudes, both personal and cultural, skills, and services are necessary. Because it contributes directly to their attitudes and skills, and thus to the service they can provide, the training of project participants should also be included here.

   While this is the the time and place to discuss in detail human resource development, it is worth noting that the role of people in development projects is very important. They are both the subjects and objects of development, particularly in community and rural development projects that attempt to improve the standard of living of the poor by involving them directly in project activities. At every stage in a project, people are crucial to its success. Project planners and development workers should, therefore, consider very carefully the selection and use of human resources for their projects. They should develop ways of working with community residents to foster enthusiasm for a project, increase local participation, engage and organize local labor, provide the necessary skills training, and promote the growth of local initiative.

(Peace Corps/Mali Resource Book)

2) Material resources are not difficult to identify: textbooks for students, draft animals for agriculture, and medical supplies for health clinics are all examples. Think about your own project; what material resources does it employ? Which are the most important? Would more material resources help you to reach your goals? Could some resources be used differently, and thus saved?

Development organizations and the material and financial resources they may provide are mentioned in another section.

3) Financial resources refers to money that can be used for development projects. Cash gifts, personal savings, development bank loans and foundation grants are all examples.

Because it is both time-consuming and difficult to raise money for development projects, it may be better to consider other approaches first. For example, it may be easier to obtain contributions of material resources, even within a relatively poor community, than it would be to organize, submit a proposal, and obtain funds to purchase these same resources from an overseas foundation.

In any case, for effective fundraising, you will need both energy and patience, in addition to skills in research and writing, communications and diplomacy, and some knowledge of financial management.

4) Technological resources. Simply defined, technology is the application of a body of knowledge, materials, and methods to practical and productive purposes. Every culture develops its own technology, based in part on its experience, resources, and needs. For many years, development planners have tried to strengthen the "modern" sector by importing capital-intensive and large-scale technologies into the developing countries, with only minimal efforts at adapting these technologies to local conditions and needs. Now these planners are shifting their focus to the traditional sector, investing in agriculture, rural development, and labor-intensive projects. This shift is marked by the development and application of appropriate technologies.

Appropriate technology for development is "technology which is most suitably adapted to the conditions of a given situation. It is compatible with the human, financial and material resources which surround its application," according to the very useful publication, A Handbook of Appropriate Technology (available at PC/Mali).

What are some other characteristics of appropriate technologies for development? Think about the technological resource needs of your own project as you consider the following qualities. Appropriate technologies tend to be labor-intensive, small-scale, low-cost, and culturally, socially, and economically acceptable to the community. They are ecologically sound, and range in technological complexity from traditional to modern industrial.

The above publication provides case studies in the development of appropriate technology projects which illustrate these characteristics, including such projects as a village-scale foundry in Afghanistan, a smokeless stove in Ghana, and a solar crop dryer in Colombia.

The ideas and applications of appropriate technology are receiving increasing attention on a world-wide basis. Several loosely organized and cooperating appropriate technology networks have been established to promote basic research and field-testing, to share their results and experiences, and to increase the participants' ability to determine their own technological needs and develop appropriate solutions.

Because the successful integration of technological resources into a development project requires an extensive knowledge of local economic, political, social, and cultural conditions, such development workers as host-country field workers and extension agents, Peace Corps Volunteers and other community development workers, who know their communities well, are particularly well suited to using an appropriate technology approach to development.

5) Informational resources are the ideas and data contained in books, research reports, films, records, and other media, and the individuals and organizations that produce them. Informational resources help development workers to increase their knowledge and understanding and thereby improve their projects. The information needs of development workers are as diverse as their projects. For example, Peace Corps Volunteers recently sought and received information on 1) the management of natural history museums for a Nicaraguan project, 2) technical papers on algae for a Fijian fisheries development project, and 3) appropriate technologies for an Eastern Caribbean wetlands forestry development project.

   The key to getting the information you need is to know specifically 1) what you want, and 2) where to obtain it. Of special interest to development workers are such technical reference service organizations as VITA (Volunteers in Technical Assistance), SID (Society for International Development), and TOOL (Stichting Technische Ontwikkeling Ontwikkelingsladen), which respond by mail to technical information requests from the developing countries.

6) Individual resources. Here the important point is that the development worker is a resource in many ways, all of which contribute significantly to the success of a development project. Development workers should view themselves, and act, as resources available to their projects and communities.

Let's review your resources. First, you act as a technological resource. You have certain needed technical skills which you are prepared to use. We know that development projects, especially those that introduce new technologies, usually involve basic change that is sometimes resisted by a part of the community. The success of the project may depend in large part on what kind, and how much, change the community will accept. The technically knowledgeable development worker who understands the community and its capacity for absorbing change, is ideally placed to help the community adapt to the new situation and so contributes to the success of the project.

In addition, your professional role carries with it a certain authority and status, to be used carefully but confidently. Working with others is an essential part of your assignment and calls for the development of interpersonal skills in observation, communication, and interaction. Because your project most likely takes place in a mixed cultural setting and involves participants from two or more cultural groups, these interpersonal skills are also inter-cultural skills.

You also act as an informational resource. Skilled in a particular field, you should be capable of 1) providing or finding other sources for information that the project or community requires, 2) presenting that information in a variety of formats - informal discussion, more formal study sessions, and short-term training programs, and 3) developing an in-depth reserve of organizational and bibliographic sources to be utilized if the need for them arises.

GUIDELINES FOR APPROPRIATE RESOURCES

The following guidelines are useful for considering the possibility of introducing new resources into your project. Appropriate resources will have most, but not necessarily all, of the characteristics below. They are:

1) a response to a recognized need
2) locally available
3) low-cost
4) technologically appropriate
5) labor-intensive
6) culturally acceptable, and
7) ecologically sound.

1) A response to a recognized need. Ordinarily there is a clear identifiable need for resources in development projects. Such a need is established by evaluating the project. Evaluation, which is also called "assessment" or "appraisal", involves studying the project to measure its progress and learn its basic weaknesses. It is important for development workers to try to understand the cause of those weaknesses or problem areas and, if possible, to relate those weaknesses to the use of resources. For example, are current resources being used as effectively as possible? The next step is to determine whether new resources would strengthen the project. If so, a need for resources has been established.

2) Local availability. This is a very important consideration and is central to using resources productively. Development is people-oriented and takes place within the community. Using local resources provides the community with much-needed opportunities to develop and demonstrate local initiative, to increase local participation in productive economic activity and to share these rewards of development within the community. Using local resources also increases the community's commitment to the project, minimizes the problems of operation and maintenance in the case of the use of technological and material resources, and requires minimal cultural adjustments by the community.

It is important to make use of local resources, whenever possible. The benefits of doing so, both direct and indirect, are clearly worth the extra time, effort, and imagination that are required. If a needed resource is not locally available, development workers should then determine the availability of acceptable substitutes. Also, consider if there is more than one way of obtaining the same resource locally. For example, in addition to seeking donations or purchasing resources, you may want to make barter agreements, whereby your project would receive needed resources in exchange for other goods and/or services.

If you are unable to get local resources, try to obtain them in the region of which your community is a part. Simply defined, the region is the surrounding area, including towns and cities, to which you have reasonable access, in terms of travel time. Sometimes, a regional capital may offer greater resource possibilities than the local community. If your regional search doesn't lead to the desired results, try the national level--the capital city. As the center of the nation's governmental, business, educational, and diplomatic activities, the capital city usually has a modern sector which may provide, after a considerable search on your part, resources which are unavailable elsewhere in the country.

Finally, if you have exhausted the local, regional, and national resource possibilities, your last resort is to seek them internationally. A decision to do so requires careful consideration, however. Remember that the search for resources at the international level is not generally promising, although much time and effort may be expended. Here are some considerations which may help you to decide whether to seek resources at this level.

A) To what extent does the success of the project depend on getting resources from overseas? As a rule, it is not a good idea to base project success on the certainty of receiving foreign resources. Because of uncertainties in communications, transportation, and customs arrangements between nations, the role of foreign resources should be minimal.

B) When do you need the resources, and what are the chances of obtaining them from abroad within that specified time period? Be prepared for delays.

C) What is the likelihood of getting exactly what you need? In seeking resources internationally, presumably by mail, you are at a disadvantage. Your search becomes impersonal, indirect, and passive. The possibility of misunderstandings increases. After all the initial effort and subsequent delays, there is no assurance that you will get what you really need.

However, if your answers to these questions do not suggest serious problems, then you may want to explore further various international resource possibilities.

Use your judgment in deciding where and how to seek resources and whether to seek them internationally. The resource-seeking scheme that has just been described above is not an absolute rule, but rather a guide. For example, it may not always be necessary to exhaust the resource possibilities at one level before exploring those of the next. An information request to one of the technical advisory organizations like VITA or TOOL poses no problem as long as every effort is made to adapt the information to local conditions. On the other hand, there are foreign resources, particularly the more complicated material and technological ones, which should not be imported into the community, even when the need is clear, unless it is also clear that a local capacity to absorb and manage the new resources exists, or can be created without too much difficulty.

3) Low cost. Resources should be obtainable at low cost. Most developing countries have extremely limited funds; if less is spent on material resources, more can be invested in labor-intensive resources and projects. Cost includes continuing operation and maintenance in addition to the initial purchase price; these secondary costs are especially important when you are considering technological resources, particularly expensive, imported ones. Keep in mind the possibility of getting resources free of charge. For example, small, local businesses may contribute materials or services if they are made aware of 1) the positive use to which their donations will be put, or 2) the good publicity they will receive, or 3) the effect that the success of the project will have on the local economy which will in turn increase their own business production and sales. Alternatively, you may want to make arrangements to obtain resources in exchange for services.

4) Technologically appropriate. Development workers should take care to employ only those resources that are technologically appropriate to the community in which the development project is located. Remember that the community has evolved its own time-tested and established way of doing things, including the technologies that the community uses in its productive activities. Because these technologies are an integral part of the community culture, and are not easily changed without changing the community's cultural system, development workers should assess the consequences of introducing resources into the community through their development projects. First, they need to learn how the community performs activities that are related to project activities, what the relevant technologies and techniques are, and how these technologies are related to other aspects of the community's cultural system. Then they should make sure that any new resources that the project introduces are in accord with the community's way of operating.

5) Labor-intensive. The developing world's most abundant and productive resource is its people. Since effective economic development requires using available resources, development programs must utilize people's skills to the greatest extent possible. Emphasizing the use of labor-intensive resources increases employment, economic development, the well-being of the population, and its actual participation in development.

Therefore, resources should be selected and used to put people to work. If there are several resource possibilities, choose the one or ones that are the most labor-intensive, other factors being equal. For example, plowing by hand employs many agricultural workers effectively; an ox-drawn cart will enable the same people to cultivate the land more productively and give them more time to participate in other activities. A tractor, in contrast, may leave some of these workers unemployed. The necessary parts, fuel, and expertise may not be available to keep it running, and there may not be enough land available for the efficient use of the tractor. Introducing and teaching people to use and care for an ox-drawn plow may be the most economically and socially appropriate project for a community to consider. Whatever projects are chosen, make sure that any new resources do not displace existing workers, unless acceptable alternative employment and, if necessary, training, in the community is provided.

6) Culturally acceptable. The resources which the project uses and introduces to the community must be culturally acceptable to community residents. Their common culture - the shared attitudes, knowledge, and expectations about how things are done - is firmly rooted in tradition and relatively resistant to major change. Development workers should make every effort to understand the culture they are living and working in and, in particular, should evaluate potential resources for their impact on local traditions and practices. Development workers should avoid so hasty an implementation of their projects that they neglect to determine whether the resources that it will produce, are culturally acceptable to the community. Examples of the neglect or misunderstanding of the local culture by development workers might include the following situations:

A) In a public health education project, development workers introduce into the classroom a textbook which contains information on personal hygiene which the students interpret to be contrary to their religious beliefs. The students reject the material.

B) In a rural agricultural project, development workers promote the cultivation of new, high-protein foods that the community is not accustomed to growing, cooking, and eating. The farmers, who are in frequent contact with the development workers, implement the cultivation and harvesting aspects of the project, but their families do not prepare and eat the new foods, and revert to their low-protein, subsistence diets.

How might development workers avoid these problems, which are primarily based on lack of insight into the community's culture? Very simply, they need to develop an understanding and awareness of, and sensitivity to, the local culture. To understand that culture fully, they should study the political, economic, social, religious and intellectual aspects of community life and, more important, grasp how these aspects of culture are variously combined in community activities. Development workers can build their practical knowledge by reading and studying available information and by observing and participating in community activities. It is particularly helpful for development workers to become friendly with community residents who do not mind explaining local customs to them.

7) Ecologically sound. Ecology is concerned with the relationships between all living things and the environment. People working in development planning are more and more concerned with the effects of development projects on the environment and their concerns include such broad issues as the effects of the use of different kinds of natural resources and, more important, what knowledge, policies, and actions are required to maintain the balance between people and nature. While you are not expected to become an expert in ecology, you should be able to estimate, or obtain others' help in assessing the ecological impact of your development project and the resources that it introduces.

Human Resources: Working with the Community

It cannot be emphasized too strongly that the success of a development project depends in large part on the maintenance of a harmonious, informed, and purposeful working relationship between the project's development workers and the residents of the community in which the project is located and/or the community that is primarily affected by that project. If project workers and community participants/residents do not 1) work well together, 2) communicate and share necessary and useful project information, and 3) pursue common objectives and carry out similar project-supporting activities, there is little chance that the project will achieve its primary objective. Development workers must realize that the development of the community's human resources, in a way that both supports project goals and activities and also promotes the growth of community initiative and self-reliance, is central to overall project success.

In what ways do project development workers interact with community residents to achieve their project's basic objective? Here are some of the responsible functions that development workers must perform that bear directly on both the community and the project. At each stage of the project's development, these steps engage the community in project activities as human resources and also promote community development, if well performed. What form these steps take, and the order in which they are carried out, depends on such factors as the nature of the project, the number of development workers, and particular local conditions. In one way or another, however, they are applicable to all development projects.

First, development workers inform the community about the project, the development problem it seeks to solve, its primary objective, the proposed benefits to the community, and the ways in which community residents might participate in the project. In turn, the development workers seek information from the community about the ways in which the community might assist the project. Already a relationship is being established which will vary through further stages of the project's development.

Second, development workers must recruit project participants from the community. At this point, the development workers enter into an active working relationship with the community residents, who may either become direct participants in the project, as members of a cooperative, for example, or provide needed project-supporting goods and services to it. In performing these recruitment functions the development workers should foster community enthusiasm for the project by discussing its benefits and activities and employment and income possibilities.

Third, development workers must organize the project-supporting activities and resources, including labor, that are necessary to produce the project's anticipated results. In order to do this, they need to understand how community residents perform similar activities, and this, in turn, involves understanding the community cultural patterns, including its economic and social organization, and nature and operation of its technologies.

Fourth, development workers relate directly to community residents/participants by training selected people in the skills that are necessary to effectively carry out project-supporting activities. The way in which this training is performed will directly affect the success of the project.

Fifth, the development workers interact with the project participants and other community residents in the day-to-day management of the project until such time as the project participants can themselves capably operate the project and effectively manage its activities.

Sixth, the development workers will eventually transfer the responsibility for the continuing operation of the project to the project participants and the community. For the development workers, this step involves performing a combination of the above functions, with an emphasis on training project participants to carry out the major management and technical aspects of the project.

Keeping in mind that you will be performing these six project functions, consider the following specific suggestions for working with, and helping to develop, the community's human resources. They are taken from Some Points for Consideration of Technicians Working with Villages, by Arthur Raper (US Agency for International Development, Washington DC, 1961).

1) "Be sure your presence in the village is understood."
2) "Find a basis for common interest with the villagers."
3) "Try to understand why they do things the way they do."
4) "Start where the people are, and with what they want."
5) "Work within the cultural framework of the people."
6) "Note and respect the pace of the villagers."
7) "Take care that the reactions of the villagers are understood."
8) "Help the people believe they can improve their own situation."
9) "Be content with small beginnings."
10) "Utilize the villagers' own organizations, and recognize their leaders."
11) "Encourage individuals to assume responsibility, and involve as many as possible."
12) "Be short on making promises, and long on keeping the ones that are made."
13) "Make certain that technical benefits accrue at the local level."
14) "Help the government get organized to serve the village people."
15) "Train and use sub-professional, multi-purpose village workers."
16) "Expect growing pains."
17) "Don't expect thanks from the people helped."
18) "Deal with the villagers as equals."

SESSION 6: TESTING PROJECT FEASIBILITY

TIME: 1 HOUR, 40 MINUTES

RATIONALE:

Once a PCV and the community have identified a problem and decided on an appropriate project to provide assistance, it then becomes necessary to determine what is the actual likelihood of success. Without sufficient information-gathering, adequate assessment of local resources, and thorough analysis of feasibility, many community projects begin with an already high probability of failure. Peace Corps Volunteers can contribute greatly to the chances of project success by ensuring that relevant information is obtained at the outset of a project through feasibility-testing.

This session will concentrate on the important information the Volunteer and community need to know in order to have confidence in potential projects.

OBJECTIVE:

1. To determine the critical assumptions needed to test the feasibility of a project.

TRAINER PREPARATION:

1. Read the attached articles, "Project Assumptions" and "A Management Approach to Feasibility Study", before the session for background information.

2. Prepare newsprint for the following items:
   - Key points in project assumptions lecturette
   - Small-group exercise instructions
   - Analyzing assumptions chart
   - Feasibility checklist

3. Photocopy the participant handouts.

MATERIALS:

1. Newsprint and markers
2. Paper and pens for the participants

PARTICIPANT HANDOUTS:

1. Project Assumptions
2. A Management Approach to Feasibility
3. Analyzing Assumptions

PROCEDURES:

Introduction:

(5 Min)

1. Explain to the participants that project ideas are often rushed through the system because they "seem" to be what is needed, without taking into account all of the potential problems that could interfere with their success. Go over the rationale for this session.

Identification of Project Assumptions

(15 Min)

2a. Prepare and deliver a lecturette based on the Project Assumptions article, and covering the following points:

- The necessity of making assumptions in projects
- The categories of assumptions (social, political, technical, economic, physical, etc.)
- Why it is important to examine the project assumptions carefully before beginning the project
- Emphasis that "assumptions" answer the following:

  This project will succeed, assuming that:
  1. _____
  2. _____
  3. _____

2b. Refer back to the sample project design sheet being used in the workshop and complete the column on project assumptions. Entertain any questions the participants may have about the assumptions which were included.

2c. Point out to the group that testing <u>all</u> the assumptions in a project before implementation would be a time-consuming and potentially expensive task. Stress that it is, therefore, important to decide which assumptions are the most important for project success and to focus on them in feasibility testing. Explain to the participants that this process of identifying and ranking assumptions for feasibility testing is important for all projects, large or small.

(30 Min)

2d. Have the participants refer to the project/activity objectives and the resource needs they developed during the previous sessions. Instruct them to work individually to develop and rank a list of important assumptions for their projects.

TESTING PROJECT FEASIBILITY:

3a. Explain to the participants that once the project objectives have been set and the critical assumptions and resources have been identified, the next step is to test the feasibility of the project. Point out that this step will help the community and the Volunteer to avoid pursuing a project idea without considering alternate options that might be less expensive, more durable, quicker and easier to implement, or easier and cheaper to maintain. (5 Min)

3b. Stress that a feasibility study does not have to be extremely complex and time-consuming, but it should contain enough information to indicate that the best solution to the community problem has been selected.

ANALYZING PROJECT ASSUMPTIONS:

4a. Introduce the "Analyzing Assumptions" chart by explaining to the participants that this is one way to look at the three critical questions about a project assumption: (10 Min)

- Is it essential for project success?
- How certain is it that the assumption will hold true?
- What is required to check out uncertain assumptions?

4b. Review the chart with the trainer's example, and point out that when assumptions are uncertain it becomes necessary to test their feasibility, and it is very important to know the types of questions which need to be asked.

4c. Have the participants refer to the project objectives and the resource needs they developed during the previous sessions. Instruct them to work individually to complete the section related to project assumptions. Remind them to rank their assumptions according to their level of importance.

4d. Divide the participants into pairs to review the assumptions just identified for their projects. Have them ask each other the following questions: (20 Min)

- How much risk or uncertainty is involved in the assumption?
- How crucial is the assumption to the overall success of the project?
- What is the impact on the project if the assumption does not hold true?
- What alterations can be made in the project, while still maintaining its likelihood of success?
- If outside resources are required, what is the likelihood of obtaining them? From what source?
- Have projects with similar assumptions succeeded in the past? What data is there to support this?

(10 Min)

4e. Reconvene the large group and lead a discussion of the methods project designers can use to get more information on the feasibility of the assumptions they have made. Who would they talk to? What data sources would they use? How long would they take to complete the feasibility study? What types of information would lead them to say "no" to a project?

TRAINER NOTE

Included in the list should be the following:

Examine official records (country and PC)
- Statistics collected by government.
- Records on projects, money spent, etc.
- Needs assessment data, if collected.
- Monitoring forms, if used.

Discussions
- Individual interviews (community and elsewhere)
- Group meetings.

Observation
- Visiting a similar project.
- Observing existing situations.

CLOSURE:

(5 Min)

5a. Summarize the work of the session by pointing out that thorough feasibility testing can help to avoid unanticipated problems during the implementation of a project by pointing out the key issues which need to be considered. Some of the issues identified will cause the project to be cancelled; others will necessitate re-designing it on more realistic terms. Each of these courses of action can help to conserve scarce human, material, and financial resources for the community.

5b. Distribute the handout "A Management Approach to Feasibility Study" for the participants to keep as reference material.

PROJECT ASSUMPTIONS

Every project has uncertainties. The nature of the uncertainties can be expressed in the form of assumptions which much be valid, but which cannot be directly controlled. Assumptions can be the most critical factors in a development project. Many projects fail because planners make unrealistic assumptions, or forget to define and examine the implicit assumptions they are making.

It is impossible for a project manager to control all the factors which can affect a project. There are always social, political, technical, economic, physical, and other factors beyond the project manager's control that are necessary for successful achievement of project objectives.

To have confidence in the design of a project, it is essential to define, at each level, all the conditions necessary to reach the next level of objectives. These conditions include hypotheses (predictions) which are internal to the project, and assumptions (conditions) which are external to the project. After identifying the assumptions affecting the project, they can be dealt with in a way that increases the probability of success.

Development projects involve important objectives and scarce resources, so we must examine whether our predictions in the project design are valid. Before we begin the project, we want to be confident that we can achieve our objectives. We must, therefore, carefully examine what we are assuming about factors outside our control that could be detrimental to achieving our objectives. We identify those factors in the "assumption column" of the Project Design Chart at the same level as the objective they influence.

After identifying as many critical assumptions as possible with the information at hand, they can be looked at more closely and defined more specifically.

In a rice production project, for example, "adequate rainfall" is obviously necessary. Project planners and managers need more guidance, however, if they are to assess the validity of this assumption. How much rainfall is adequate? We must know how much rain is required and when it should fall. If we find that the rains must begin in May and last through October, with a monthly average of 12 inches, the next step is to find out if it is reasonable to expect this level and pattern of rainfall. If review of the climate records in the region shows that for eight of the last twenty years, rainfall was less than 8 inches for the months of June and July, our assumption of adequate rainfall would not be valid.

If our assumptions are likely to be invalid, we have several options to consider. First, we could continue with the project "as is", and accept the lower probability of success. Second, we could examine if there is some way to modify the project to overcome the weak assumption. In the rice production example, perhaps an irrigation system could be included in this (or another) project to bring a sufficient supply of water to the crops. Finally, if there are insufficient resources to develop an irrigation system, the project could be abandoned because it is unworkable--thus averting project failure before large amounts of time and resources are expended.

A MANAGEMENT APPROACH TO FEASIBILITY STUDY

In recent years, project feasibility study has become an increasingly detailed and technical set of procedures practiced by highly trained economists and engineers. And yet very often these procedures seem irrelevant to the practical people designing and managing projects. Why? Perhaps it is because these procedures ignore some of the most important questions.

What do practical project designers need to know in order to have confidence in potential projects? Essentially they need to know (1) if the proposed project will really achieve its objectives; (2) how they can improve the likelihood and level of its impact; (3) whether there is a less expensive way to achieve the same results; and (4) whether, all things considered, the benefits justify the costs.

I. WILL THE PROJECT SUCCEED? HOW CAN IT BE IMPROVED?

The most important question is the plausibility of the suggested project design. Managerially useful feasibility studies begin with this question. And the most effective of these studies treat project plausibility not merely as a question, but as a challenge. In other words, such studies don't simply ask "Will it succeed?", they ask "How can we make it succeed?" They take an active, not a passive, role in project design.

Feasibility study, by itself, cannot increase a project's likelikhood of success. What it can do is substitute risk (known probability of failure) for uncertainty (lack of information) and suggest practical measures for reducing the risk by modifications to the project design. In other words, it can provide us with information on how likely our project is to succeed and how we can increase that likelihood. As managers, we must learn to demand nothing less of feasibility analysis.

Projects are theories about the world. If we do certain things, we expect certain results will occur. And if these results do occur, we believe they will have certain impacts.

A. ANALYSIS OF ASSUMPTIONS

Potential feasibility questions exist wherever there are sources of uncertainty--i.e., wherever we are unsure of "facts" or "effects". These "facts" are the assumptions, and the "effects" are the hypotheses.

How do we go about analyzing assumptions?

First, and most important, make sure all of the important assumptions are identified. To do this, ask yourself, skeptics, and as many others as possible, to describe the **factors which could prevent the project from reaching its objectives.** In essence, the questions is "What, beyond my direct control, could cause this project to fail?" The answers to that question are the assumptions.

It may be helpful to group the assumptions by type, e.g.:

- economic factors
- financial factors
- political factors
- technical factors
- cultural and social factors
- geological/climatic factors
- managerial factors

The type of assumptions chosen for analysis will determine the type of feasibility study needed to investigate them.

Third, identify the assumptions most appropriate for analysis. Out of the long list of assumptions, how do you choose the correct ones to study? We suggest a simple two criteria basis for selection--importance and uncertainty.

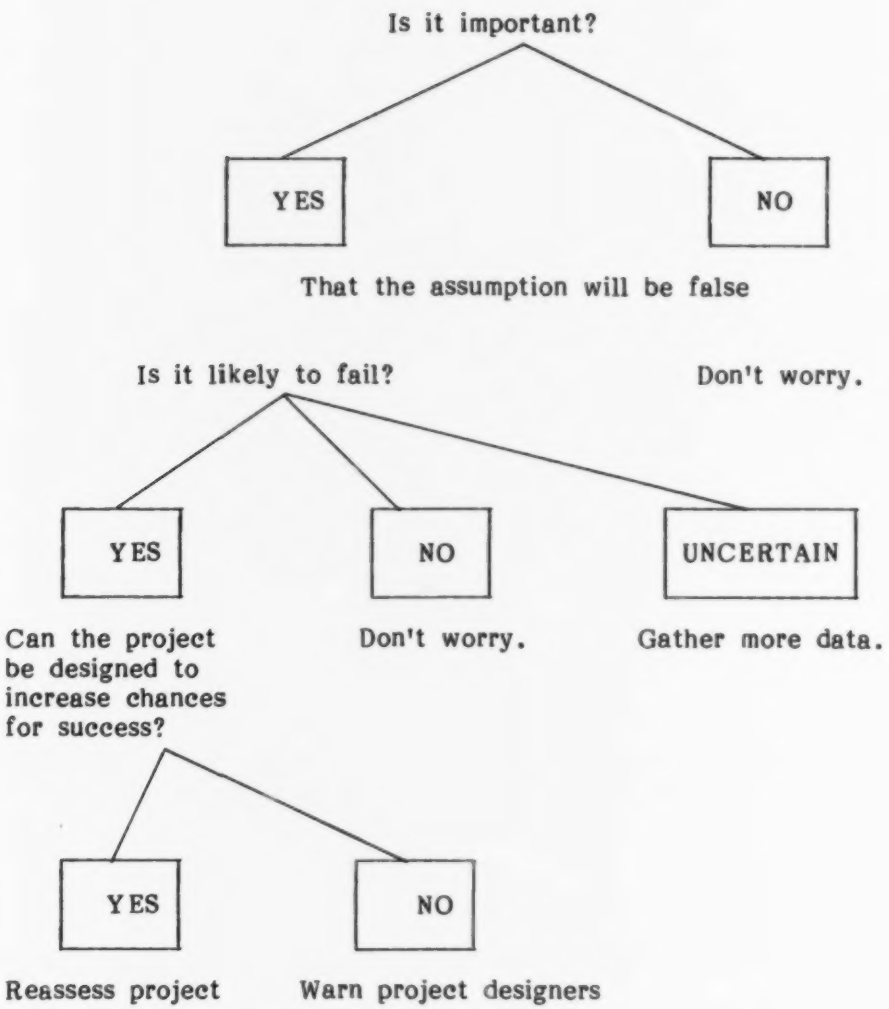
To begin, ask of each assumption whether it seems truly essential for achieving project success. If its influence seems more or less incidental, forget about it. If the assumption is judged to have high potential influence, then ask yourself how uncertain project designers are about the likely performance of that assumption. Only where assumptions are important and insufficiently understood is detailed investigation worthwhile.

Arrange data collection efforts to provide the information you need. The data collected on assumptions should reduce the uncertainty of project designers about:

- whether key assumptions are likely to hold true or not;
- what the effects on project success would be if any of the key assumptions do not hold true;
- what means are available to managers to influence or avoid dangerous assumptions.

If assumptions are unimportant (i.e., low impact) or very probable, they should not affect project design or selection. When assumptions have high impact and low probability, it is a danger signal. If we can re-design the project to effect the assumption, we may wish to go ahead. Otherwise, we would be well advised to suggest that the project be abandoned in favor of something more promising.

ANALYZING ASSUMPTIONS



SESSION 7: DETERMINING PROJECT ROLES AND RESPONSIBILITIES

TIME: 2 HOURS

RATIONALE:

All community projects with which Peace Corps is involved stress the importance of involving the local community in design and implementation. Emphasis is given to the goals of shared responsiblity for the project and to building local capacity within the community for similar projects in the future. One way in which to be certain that these goals are met is to clearly define who the community is, and to work out what the roles and responsibilities of the implementors will be during the project.

In this session, the participants will focus on defining their own, and the community's, roles in project design and implementation. They will also practice negotiating responsibilities within a cross-cultural context.

OBJECTIVES:

1. To explore the roles of various members of the local community in the design and implementation of a small community project.
2. To determine who will be responsible for different tasks within the project and develop a means of assigning those responsibilities.
3. To practice negotiating roles and responsibilities within a specific cultural context.

TRAINER PREPARATION:

1. Familiarize yourself with the "Roles and Responsibilities" Chart which will be introduced during the session.
2. Develop guidelines for a 10-minute simulation on role negotiation, based on local cultural norms.
3. Develop newsprint for the following items:
   - Small-group task instructions
4. Find out about any particular local cultural issues you should be aware of regarding negotiation and ways of reaching agreement within the culture.

MATERIALS:

1. Newsprint and magic markers
2. Paper and pens for participants

PARTICIPANT HANDOUT:

1. Roles and Responsibilities chart

PROCEDURES:

Introduction:

(5 Min)

1a. Introduce the session by pointing out that the term "community involvement" is a frequently used one in the Peace Corps when referring to project design and implementation. Obviously, this does not mean that all members of the community will be involved in every step of the project from its inception to its evaluation. It is important, therefore, to actually define what is meant by "community" in order to understand how the roles and responsibilities for the project will be handled.

1b. Review the rationale for the session.

Defining the Community:

(10 Min)

2a. Put the phrase "community involvement in a project" on newsprint, and ask the participants to define what it means. Bullet the key points in each definition on newsprint. Be sure that the various types of community members who might play a role in a project are included in the list.

> TRAINER NOTE
>
> Ensure that the following types of individuals are included in the list: village leaders, project recipients, counterparts, technicians, laborers, Peace Corps Volunteers, line agency personnel, etc.

(10 Min)

2b. Explain to the participants that one of the keys to successful implementation of a project is having a clear understanding of who is responsible for what tasks during the life of the project. Point out that this means the community's as well as the Volunteer's responsibilities.

RESPONSIBILITY CHARTING:

3a. Introduce the "responsibility" chart as a way of helping everyone who is involved in the project agree on roles and responsibilities for various aspects of the project. (See attached chart.) Include the following points in the explanation: (10 Min)

- All the individuals involved in implementing the project should be listed across the top of the chart with a column for each.
- All of the tasks/activities should be listed down the side of the chart, with a line for each.
- A simple letter code can be used to show the level of responsibility each individual has for each task.

  A = Approve
  R = Responsible
  S = Supervise
  I = Must be informed
  C = Consult

3b. Divide the participants into small groups and have them complete the following task: (30 Min)

- Individually develop a list of all the major tasks involved with the small community project you have identified in the previous sessions.
- Assign each of the tasks to specific individuals identified in the first part of the session.
- Discuss the individual charts in the small group and choose one sample to present to the large group. (Add new individuals as identified through the exercise.)
- Choose a presentor of the responsibility chart to the large group.

3c. Reconvene the participants and have each small group present its responsibility chart for critique/comments. Tell the large group that they should concentrate particularly on the completeness of the tasks included, and the appropriateness of the individual assigned to carry them out. Have the participants point out any gaps or overlapping responsibilities which seem inappropriate. (20 Min)

3d. Lead a large-group discussion of the following questions:

- What are the potential uses of a responsibility chart? What areas does it help to clarify?
- Who should be involved in the development of such a chart?

TRAINER NOTE

Point out the following if the participants do not mention them:

- Reading across the rows shows how the various responsibilities for a single task/activity are shared among project members. This helps to clarify project authority and coordination needed to accomplish each activity.
- Reading down the columns shows the total responsibilities for each person, and amounts to a job description.

(5 Min)

3e. Point out to the participants that while a responsibility chart is a very helpful tool in managing a project, it is effective only if developed within a specific cultural context. To illustrate this point, ask the participants if they have ever had the experience of thinking that community members or counterparts have agreed to something, only to find that there was really no agreement understood. After hearing one or two examples, point out that unless a Volunteer is aware of how to properly negotiate who will take responsibility for various aspects of a project, it may never really get off the ground.

OBTAINING AGREEMENT:

(15 Min)

4a. Write the following phrase on newsprint, "Ways of Obtaining Agreement Within My Community". Ask the participants to take five minutes to think about the cultural norms in their communities as they apply to negotiation and agreement to various roles and responsibilities within a community project.

TRAINER NOTE

Devote sufficient time to the ways of obtaining agreement within the local culture as it may take the Volunteers a while to identify them. Some questions to prompt thinking include:

- How are decisions made within the community? Is there a formal/informal leadership structure for decision-making?
- What verbal/non-verbal cues do you receive when people agree or disagree with you?
- What kinds of verification do you need of commitments you think you have received from people?
- How do you know if someone agrees with your ideas?

4b. Have individuals volunteer to share their lists with the large group. Lead a large-group discussion of how community projects can be affected if Volunteers are not aware of these culural norms for negotiation and agreement. (Be sure that the Volunteer's role in the project is also mentioned at this point.)

4c. Set up a 10-minute simulation of a PCV nogotiating a project role with a local community member. Stress that the simulation is to be conducted in a manner which is appropriate to the local culture and that it should include both verbal and non-verbal methods of reaching agreement. Ask for two participants to play the parts of Volunteer and community member. (If possible, have a host-country national play the role of community member.) (20 Min)

4d. Allow the simulation to proceed for 10 minutes, with the remaining participants observing the interaction for comments at its conclusion.

4e. Thank the role players at the end of the 10 minutes, and solicit their reactions to the simulation situation. Ask the following questions of each:

- Did the situation seem real? What were the difficulties in gaining agreement?
- What kinds of verbal/non-verbal cues indicated lack of agreement? Agreement?

4f. Solicit comments from the observers regarding the simulation interactions, using the same questions as above to obtain any additional information the players may not have noticed. Ask the large group what follow-up steps would be necessary within the culture to ensure that agreements reached are actually carried out.

CLOSURE:

5a. Close the session by reminding the participants that having clearly defined roles for project members at the start of the project, and putting these roles in writing, can save a lot of confusion about respnsibilities once the work is underway. Tell them that the next session will focus on monitoring and evaluating projects, a crucial element in knowing whether plans are really working out in the real world. (5 Min)

RESPONSIBILITY CHART

Task/Activity	Individual Responsible							

CODE
R=Responsible To Do
S=Supervise
A=Approves
I=Is Informed
C=Consults

SESSION 8: MONITORING AND EVALUATING SMALL COMMUNITY PROJECTS

TIME: 2 HOURS, 30 MINUTES

RATIONALE:

Thorough planning allows the community and the Volunteer to feel that they have given their project an excellent chance of being successful. The next important step in the process is monitoring the progress of the project to identify unanticipated problems and plan effective action steps to solve them. During this session, the participants will examine the tasks involved in monitoring projects, and identify items to monitor.

Once a small community project has been completed, evaluation of the experience provides valuable data on what happened and why for individuals and communities planning similar projects in the future. During this session, the participants also will relate the evaluation process to the overall planning of projects, examine the types of evaluation measures which can be used for small projects, and apply these measures to specific project objectives.

OBJECTIVES:

1. To distinguish between monitoring and evaluation.
2. To identify the essential components of effective monitoring and evaluation.
3. To develop a checklist for monitoring and evaluating small community projects.
4. To plan action steps to resolve problems identified through monitoring.

TRAINER PREPARATION:

1. Read the attached articles "Monitoring & Evaluation", "Evaluation", and "Evaluative Criteria" before the session for background.
2. Prepare newsprint for the following items:
   - Small-group discussion task
   - Sample project objectives and specific indicators

MATERIALS

1. Newsprint and markers.
2. Paper and pens for the participants.

PARTICIPANT HANDOUTS:

1. Monitoring and Evaluation
2. Evaluation
3. Evaluative Criteria

PROCEDURES:

Part I: Monitoring

Introduction:

(5 Min)

1. Review the overall rationale for the session as written above.

MONITORING SMALL PROJECTS:

(15 Min)

2a. Write the words "monitoring" and "evaluating" on newsprint, and ask the participants to provide definitions for each of them. Have them focus specifically on why and when each of these activities should be done in a project.

> TRAINER NOTE
>
> Included in the definition of monitoring should be the following: routine checking of work or performance that occurs throughout a project.
>
> Included in the definition of evaluation should be the following: comparison of actual work or performance against what was expected in the project objectives.
>
> Ensure that the participants understand that both monitoring and evaluation should be done at regular intervals throughout the project.
>
> Tell the participants that the remainder of this session will focus on monitoring.

2b. Explain to the participants that the first step in monitoring is determining what to monitor. Tell them that the project objectives and activities they developed in earlier sessions will form the basis for deciding what should be monitored. These will, in effect, tell them what the actual indicators of progress will be.

2c. Refer back to the sample project objectives and activities you have been using during the workshop and ask the participants how they would measure whether these objectives were actually being accomplished...what indicators would they use?

2d. Put the indicators for the sample project on the project design sheet, utilizing indicators recommended by the group and those you prepared before the session.

HOW/WHEN TO MONITOR:

3a. Explain to the participants that once they have decided on what to monitor, the next task is to decide how and when to do it. (30 Min)

3b. Introduce the following questions for consideration when deciding when and how to monitor:

Quantity: How much is enough?
Quality: How good does it have to be?
Time: By when does it need to be completed?

3c. Have the participants work individually and complete the "what", "how" and "when" sections of the monitoring column for their projects. At the end of 15 minutes, have them exchange worksheets for comments and corrections.

3d. Explain to the participants that a normal outcome of monitoring is the identification of problems which need attention. Part of the monitoring process includes identification of problems in the project and finding solutions to those problems.

3e. Close this portion of the session by having the participants discuss what steps they could take to ensure that effective monitoring is included in small community projects, and how they could use the information to improve the project. Tell the participants that the next half of the session will provide information on another important tool to have: evaluation. (10 Min)

3f. Pass out the handout "Monitoring and Evaluation" for the participants to keep as reference material.

Part II: Evaluation

4a. Remind the participants that the monitoring process covered earlier in the session is designed to provide a method of measuring and improving activities during the life of a project. Evaluation provides the kinds of information that needs to be obtained after the project is completed. It is the final judgment as to whether the project accomplished what it was designed to do. (10 Min)

4b. Ask the participants the following question: "If you were coming back to look at a project two years from now, what types of information would you seek to judge the success of the project? Put the categories of their responses on newsprint.

> **TRAINER NOTE**
>
> If the participants have difficulty with the above exercise, you may use the following questions to prompt them:
>
> What kinds of data would you want in order to measure the long- and short-term impact of the project?
>
> How much change would be enough to deem the project successful? (100%, 50%, etc.)
>
> How would you measure the capacity-building goals of the project?

(20 Min)

4c. Divide the participants into 2 groups and provide the following task (already on newsprint):

- Select one project as a group and develop strategies for how you would evaluate the project's success, keeping in mind the previously identified questions.
- Select a spokesperson to present the project case to a panel of judges, with the other small group acting as the jury.

You have 20 minutes to prepare.

> **TRAINER NOTE**
>
> Have a co-trainer and staff member play the roles of the judges. If possible, have host-country nationals in these roles.
>
> Instruct the judges to ask questions similar to those identified in the previous trainer note. Be sure that they are not overly intimidating in their role-playing, but that they treat this exercise in a lighter way which reinforces the necessity of considering evaluation criteria when designing a project.

(20 Min)

4d. Reconvene the large group and allow 10 minutes for each presentation, with comments and critique.

Development of Evaluation Criteria:

(30 Min)

6. Have the participants work individually to complete the following task (already on newsprint):

   a. Review the information on your project design sheets for consistency and practicality.

   b. Develop evaluation criteria for the objectives you have identified for your project.

   c. Specify how information will be gathered for the criteria, and what data sources will be required.

   d. Identify any information gaps that need further discussion with the community upon your return. Develop specific action steps for these areas.

   e. Be prepared to present your work to the large group for comments.

CLOSURE:

5. Close the session by pointing out to the participants that effective project evaluations can be very educational tools for everyone involved with community projects. They can be particularly useful in helping the community to learn how to be more successful with similar projects in the future...thus contributing to the goal of local capacity-building. (5 Min)

MONITORING AND EVALUATION

Monitoring is a necessary tool for effective project control. It can be defined as watching and influencing key activities and accomplishments. In order to be effective, however, it must also include telling someone about the progress, problems, and future prospects in order to take whatever types of actions are necessary to solve project problems.

The specific items to monitor will vary among projects, but they usually include a range of performance, technical, and cost factors. Five types of information which are part of a good monitoring plan are:

- project activities and progress toward objectives
- project expenditures to date
- resource availability and utilization
- schedule realism and changes
- administrative issues

Monitoring is different from evaluation. Monitoring measures whether the project is on track; evaluation questions whether it is on the right track. Monitoring is concerned mostly with project activities, and concentrates on the short-term performance compared with the project plans. Evaluation looks more at the overall project purpose/objectives, and examines longer-term effects of the project. Monitoring is a continuous process, while evaluation is a periodic event.

The scope of evaluations is broader than that of monitoring. In the case of small community projects, evaluations are done at the completion of the project and are geared toward assessing overall results against the original plan, and toward providing data for similar projects in the future. Specific questions to be answered include:

- Did the expected level of change occur? If not, why not? Was there local capacity building?
- Were the activities suitable to accomplish the objectives?
- Did the necessary resources actually materialize? Were they sufficient?
- Did the project remain within the budget allotted?
- Were there any secondary benefits from the project?
- Will the community be able to maintain the project?

EVALUATION

The final phase of the project is the evaluation and refinement of policy and planning factors. The first task is evaluation and follow-up. While it is possible to evaluate project results immediately, actual benefits -- both anticipated and unanticipated -- together with side effects, may not become apparent until the project has been operating for some time. Evaluation thus needs to cover several time periods. Evaluation normally includes a retrospective examination of the project in attaining its intended goals within the framework of both the timetable and the budget. However, experience clearly demonstrates that it is necessary to consider evaluation as an ongoing process integrated with each phase. For example, evaluation procedures must be designed to analyze and propose solutions to problems that may arise during the tasks of activation, implementation, supervision, and control. Ongoing evaluation, which includes retrospective evaluation, should result in a careful documentation of experiences which can provide both insights and lessons for improving project planning and project management in the future.

Evaluation of a project can take several forms. These include evaluation by those responsible for implementing the project and by others with an interest in the project, including funding organizations and contractors. Those funding the project will undertake a thorough investigation of its financial aspects, including an effectiveness study of goal attainment. The agency responsible for the project will be concerned with determining whether goals have been attained and whether the expected impact will be achieved. The studies should also consider, in addition to impact on the target group, the impact of the project on the political, social, cultural, and environmental factors relating to the project. An exhaustive evaluation of each phase to determine its contribution to the project in regard to budget, timetable, and other factors is most desirable. In most cases, however, the project as a whole is evaluated with little effort made to analyze each phase or each task separately.

Related to and often arising from the evaluation of a project is the need for project follow-up. Follow-up activities may vary from determining how unmet needs can be satisfied to action on project tasks not properly fulfilled. The piggy-back or follow-up projects mentioned earlier may come into play at this point. For a project to achieve its full objective, smaller or related projects may need to be implemented almost immediately. There is then a clear need to relate follow-up action closely to evaluation of projects. Follow-up action is one aspect of the project manager's role which could involve considerably more commitment than he initially envisages. If follow-up action means the difference between the project's being fully operational or not, then it is a wise investment to undertake these activities as quickly as possible. Aspects arising from the follow-up procedures may be useful in the future. If the project is successful, guidelines can be set down for the project to be repeated in another setting.

Adapted from Project Management Journal, December 1984, pp.75-76.

EVALUATIVE CRITERIA

1. **Appropriateness** -- Was it "right" for you to use this kind of strategy? This question includes whether or not the strategy was appropriate to the organization's overall purpose and also whether the strategy was appropriate for anyone to use at all. An extreme example: most people would probably agree that mercy killing is not an appropriate strategy for eliminating the problem of potential dropouts and delinquents.

2. **Adequacy** -- Given the size of the problem, did this strategy make enough of a difference to make it worth doing? For example, suppose there were 1,000 students with serious family and personal problems, and you had a strategy that would do a fantastic job of helping 10 of them. Was it worth doing?

3. **Effectiveness** -- How successful was this strategy in reaching the stated objective? For example, if the objective was that 100 students resolve a personal and family problem, did the strategy of counseling students really enable that many to resolve their problems? If the objective was that 100 secretaries would improve their shorthand skills, did the strategy of providing training in taking dictation and transcribing shorthand notes really enable them to do a better job? Might increased on-the-job practice of shorthand have been just as effective or more effective?

4. **Efficiency** -- How costly was the strategy compared to the benefits obtained? Were the benefits obtained worth the money and the other resources used? Did we get the most for our money? For example, if the costs of counseling were less than the costs resulting from future delinquency, then it was an "efficient" strategy. If the cost of training a sales force was more than the amount of projected future income from increased sales, then this was an "inefficient" strategy.

5. **Side effects** -- What good and bad side effects occurred as a result of the strategy? For example, a bad side effect of counseling might be generating hostility in the parents toward the school, while a good side effect might be the students' improved performance in school. A bad side effect of implementing a new budgeting process might be an increase in staff reporting time, while a good side effect might be that more accurate or more detailed or more useful information is generated for use in upcoming budget requests.

Adapted from a paper by Professor O. Lynn Deniston, "Evaluation of Disease Control Programs," Washington DC, US Department of Health, Education and Welfare Public Health Service, March 1972.

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